The Ontario Institute for
Studies in Education

Annual Report of the Board of Governors

1985/86

THE ONTARIO INSTITUTE FOR STUDIES IN EDUCATION has three main functions: to conduct programs of graduate study in education, to undertake research in education, and to assist in the implementation of the findings of educational studies.

The Institute is a college chartered by an Act of the Ontario Legislature in 1965. It is affiliated with the University of Toronto for graduate studies purposes.

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The Board of Governors, 1985/86

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DORIS W. RYAN, *B.Sc., M.Ed., Ph.D. Assistant Director (Field Services and Research)*

CICELY WATSON, *B.A., M.A., Ph.D. Professor, and Chairperson of the Higher Education Group*

Director:

BERNARD J. SHAPIRO, *B.A., M.A.T., Ed.D.*

Membership is from July to June.

The Ontario Institute for Studies in Education
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LETTER OF TRANSMITTAL

To the Honourable Sean Conway
The Minister of Education for the
Province of Ontario

Sir:

On behalf of the Board of Governors, I am pleased to submit our Annual Report for the fiscal year ending April 30, 1986, as required under Section II of The Ontario Institute for Studies in Education Act, 1965.

The year described in the following pages was the Institute's twenty-first. It was distinguished, ultimately, by the degree of internal activity and external interest focused on the question of the relationship between the Institute and the University of Toronto. But it was also a year marked by the introduction of new services for practicing educators (such as the Software Development Assistance Centre), expanded instructional services through distance education technology, the introduction of new research initiatives, and the emergence of new roles for field centre staff.

Appendices to this Annual Report include the Director's statement (to the Social Development Committee of the Ontario Legislature) of what the Institute had become in its first twenty years of existence, as well as more routine documents such as the financial statements for the 1985/86 fiscal year, enrolment figures, and lists of current research projects and of the publications of Institute faculty and research officers.

Yours sincerely,

William A. Jones
Chairman, the Board of Governors, 1985/86

Toronto, Ontario, October 1986

Affiliated with the University of Toronto

REPORT FOR 1985/86

Introduction

The question of the relationship of the Institute to the University of Toronto has attracted, and generated, so much attention both inside and beyond the Institute that it seems almost necessary to deal with that topic first in this report. But interest in that matter should not be allowed to divert attention from the functioning of the Institute itself during the past year. The amount of staff effort, time and concern actually directed toward the question of merger with the University is almost impossible to imagine in light of the degree to which continuing responsibilities were met and new responsibilities undertaken in 1985/86.

Relationship with the University of Toronto

On October 24, 1985, the Treasurer of Ontario announced in his budget speech to the Legislature that the Government of Ontario proposed to ". . . transfer the Ontario Institute for Studies in Education to the University of Toronto". This announcement effectively ended both the ongoing negotiations with the University regarding a new affiliation agreement and the explorations--also then in progress--of a possible integration of OISE with the Faculty of Education of the University. Events since then (with particular respect to these matters) have been rapid, complex and overlapping. They have, moreover, engaged a much broader spectrum of groups and individuals, both within and outside OISE, than had previously been involved in the question of the relationship between the Institute and the University.

In general, the response of the Institute community to the proposed transfer was negative, and the Institute's position is, perhaps, best summarized in the Director's "Statement for the Social Development Committee" (Appendix A). The formal response of the Institute is, however, provided in the following resolutions adopted by the Board of Governors:

Meeting of October 29, 1985

1. THAT every effort be made to retain OISE in its present structure and affiliation with the University of Toronto.

2. THAT the Board of Governors approve the Director entering into discussions with the University of Toronto and the Ministry of Colleges and Universities about the proposal of accommodating the unique institutional mandate of OISE within the University of Toronto and request a report to the Board on these discussions as soon as possible but not later than the date of the next meeting, i.e., November 26, 1985.

3. THAT in these discussions, it is important to safeguard the identity of OISE, its unique mandate, and a degree of autonomy sufficient to respond effectively to this mandate.

Meeting of December 10, 1985

Given the apparent unwillingness of the University of Toronto to enter into either a new affiliation arrangement or some alternative that would preserve the (fiscal) autonomy of the OISE Board of Governors in a way consistent with the Board's own resolutions of October 29, 1985, the Board resolved:

1. THAT the Board of Governors request the Director not to pursue any further discussions with the University of Toronto concerning the proposed transfer of OISE to the University.

2. THAT the Board of Governors request the Premier of Ontario to withdraw the government's policy concerning the transfer of OISE to the University of Toronto.

3. THAT the Board of Governors request the University of Toronto to extend the current affiliation agreement from June 30, 1986 to June 30, 1987.

4. THAT the Board of Governors request the University of Toronto to resume the recently suspended affiliation discussions with an aim of concluding a mutually satisfactory affiliation agreement by June 30, 1986, such discussions to include the possibility of a new and more substantial relationship between OISE and FEUT.

5. THAT the Board of Governors request the Director to report to it as soon as possible with regard to the previously requested exploration of a legal opinion with regard to OISE's degree-granting status.

6. THAT failing an acceptable response from the University of Toronto, the Board of Governors request the Director to explore the possibility of a long-term affiliation agreement with another Ontario university.

Meeting of January 28, 1986

Pursuant to the Board's resolutions of December 10, 1985, the Treasurer of Ontario responded that the government was not prepared to withdraw the "transfer" policy. With regard to this, the following motions were adopted by the Board:

1. THAT the Board of Governors is not prepared to accept (i) the "pooling of resources", (ii) the "unified governance", or (iii) the "common administration", specified in the Treasurer's letter.

2. THAT the Board of Governors is prepared to explore with the University of Toronto other approaches relative to the Treasurer's objective of a "stronger

and more certain relationship" between OISE and the University with a view to developing an affiliation agreement that is not only long term, but also provides for a more substantial relationship between OISE and FEUT.

3. THAT in the light of (a) and (b), the Board of Governors will contact the University of Toronto to determine if it is willing to conduct further discussions immediately with a view to reporting back to the Board of Governors no later than its meeting of March 18, 1986.

4. THAT the Board of Governors approve the Executive Committee pursuing the objective of obtaining degree-granting status for The Ontario Institute for Studies in Education.

Meeting of March 18, 1986

Pursuant to the Board of Governor's resolution of January 28 and the University's agreement to a one-year extension of its present affiliation agreement with OISE, the Board wrote to President Connell of the University of Toronto. President Connell responded on March 10, 1986.

At its meeting of March 18, 1986, the Board considered President Connell's rejection of its proposal and his recommendation of an alternative approach; the Board then resolved:

WHEREAS the Board of Governors of The Ontario Institute for Studies in Education has stated at its meeting of January 28, 1986, its position with regard to the proposed transfer of OISE to the University of Toronto, and

WHEREAS the OISE Board of Governors does not find the terms of reference for discussions between the Institute and the University as outlined in President Connell's letter of March 10, 1986 acceptable, and

WHEREAS in a spirit of cooperation and in the hope that OISE and the University can, through discussion, develop an alternative framework for considering their future relationship to each other,

THAT the Board of Governors refer the letter from President Connell to the Status of OISE Committee and authorize the Executive Committee to take appropriate action concerning the letter.

President Connell's letter was referred to the Status of OISE Committee, and the Board's Executive Committee resolved to:

. . . seek a meeting with President Connell to pursue further item (1) of his letter of March 10, 1986, i.e.:

"The University will agree to undertake negotiations as set out in Mr. Jones' letter. We would conscientiously attempt to reach an agreement which is satisfactory to the Institute and which serves the University's objectives. Our hope would be, however, that the agreement would be either of a form which complied with government policy, or one which could reasonably be expected to induce the government to modify its policy to accommodate agreement."

At the end of April, 1986, the situation remained unsettled, but there seemed to be possibilities for constructive activity in the immediate future. We anticipate the submission of a Private Member's Bill to confer degree-granting status on the Institute, and we will continue to seek positive grounds for negotiation with the University of Toronto.

The period since the Treasurer's announcement on October 24, 1985 has been one of considerable anxiety and ambiguity for the Institute community. In such circumstances, it was extremely heartening to witness the extraordinary mobilization of support for the Institute. We are truly grateful to all of the organizations and individuals who have made presentations to government committees, written letters to members of the legislature, joined delegations to meet with local MPPs to discuss the status of OISE, or otherwise supported the Institute's continuing autonomy.

Academic Office and Graduate Studies

Enrolment during the 1985/86 Regular Session totalled 2371 with 646 full-time students and 1725 part-time students. As indicated in Appendix C, there was a decline in total full-time enrolment of 6.4% and an increase of 5.5% in total part-time enrolment.

Appendix D provides a table of graduates by degree program from 1981/82 to 1985/86.

Graduate Studies activities emphasized:

- incorporation for 1986/87 of the new program requirements in the M.Ed. degree program and of the doctoral comprehensive examination (for all Ph.D. degrees and in some departments the Ed.D.)

- financial assistance to students: the awarding of 55 OISE Scholarships (81 were offered) and the granting of 149 Graduate Assistantships (188 were offered)

- monitoring of the new Institute policy relative to Ethical Review for Research on Human Subjects as it applies to doctoral theses

- during 1985/86, 38 off-campus courses were offered in fourteen locations. There were 397 registrants. The majority were enrolled in part-time M.Ed. programs. Thirteen of the courses were conducted in the distance education mode and three courses were held at Humber College which had requested the Institute's Higher Education Group to provide courses the previous year for staff training and M.Ed. degree purposes. Locations offering off-campus and distance mode courses are listed in Appendix E.

Three particular academic initiatives with respect to the Academic Office, which includes the Graduate Studies function, deserve elaboration:

The Instructional Resources Development Unit

The Instructional Resources Development Unit (IRDU) began operating in May 1985 with a broad mandate to contribute to and support OISE instructional practices, and related research and field development projects. Created by merging media production and media services and incorporating the distance education project, the Unit allows for both a continuation of certain services and a broadening into new areas of development. Its mandate was developed to provide a coherent, clear focus for improving the use of media-related instructional resources in the graduate programs. Plans for the next academic year centre on an increased OISE client base, writing, field centre and development projects, consultative and production activity, and on developing the quality and range of models for off-campus learning, using various interactive communications technologies.

Distance Education

The design and implementation of distance mode courses at OISE, begun in 1981, is part of a growing trend nationally and internationally. Its development within the context of graduate level work has demanded attention, in the design phases of course production, on an interaction approach as distinct from a straight transmission-of-information approach. A strong emphasis has been placed on course design, new curriculum development, delivery, and evaluation of the courses. Two operational models have been developed. To date, twenty distance education courses have been developed and evaluated on a cooperative basis among faculty, IRDU, the Graduate Studies Office, and the Library.

Principals' Preparation Through OISE

Since 1985, OISE has been involved in the formal preparation of school administrators through non-graduate courses. OISE now offers or will soon be offering Principal Certification and Refresher courses in several locations throughout the Province. Initiatives in both courses are being pursued through the recently established Centre for Principal Development located at OISE, through the OISE/University of Western Ontario Leadership Centre in London, and through two OISE Field Centres--Northwestern Centre in Thunder Bay and Midwestern Centre in Kitchener. All these centres operate within the OISE

Field Services and Research Office in cooperation with the Academic Office. For example, participants in the Summer 1985 program of the Centre for Principal Development continued their work in the Fall and Winter terms with a practicum; approximately half of the sixty participants received credit toward M.Ed. degrees while the others were not enrolled in degree programs.

Field Services and Research

(a) Field Centres

Field centre activities were restructured, just prior to the beginning of the 1985/86 year, under the coordination of an elected Division Head, Kenneth Leithwood. Field centre staff appear to be enthusiastic about this structure and certainly it has resulted in a marked increase in the quality and scope of inter-centre collaboration. Collaborative work has been further enhanced by completion of the computer linkage which facilitates communication among centres and between the centres and OISE faculty and administrators.

Significant products of this enhanced collaboration are (1) the successful submission to the Ministry of Education of a large multi-centre proposal, (2) the design and teaching of Principal Certification and Refresher courses in four locations by groups of field centre staff, and (3) the production of a manual for school personnel, Planned Educational Changes through the Processes of Curriculum Review, Development and Implementation. This handbook was written in consultation with a Ministry of Education writing team as a complement to the Ministry document A Curriculum Review, Development and Implementation Cycle.

The resignation of Chris Nash from Northeastern Centre at the end of the year 1985/86 raises the number of faculty positions to be filled in the coming year to three. These appointments will be made in full consultation with present field centre staff and with a clear view of the need to complement and augment the existing strengths and interests of this now highly cohesive, interactive group.

(b) Research

Revenue from sponsored research increased dramatically in 1985/86, providing a total of $3,029,000 compared to a total of $2,393,000 in the previous year. The spectrum of external sponsorship is very diverse and reflects continuing efforts to increase both the number and the scope of agencies supporting the Institute's research and development work. The number of submissions for external funding has increased steadily over the past four years and the rate of acceptance remains fairly stable, although the proportion funded by individual agencies fluctuates.

An area of research new to OISE is being pursued by Linda Siegel, recently appointed to the Department of Special Education. For the past several years Dr. Siegel has been carrying out studies of prenatal factors that may serve as predictors of learning disability or perceptual handicap, and thus facilitate early identification and remedial training prior to school entry.

Recent faculty appointments have been remarkably effective in strengthening the research program overall. Three such appointments in internal research centres are those of Marlene Scardamalia to the Centre for Applied Cognitive Science, of Monica Heller of the Centre for Franco-Ontarian Studies/Centre de Recherches en Education Franco-Ontarienne and the involvement of Ruth Hayhoe in the Educational Evaluation Centre.

By far the most dramatic event related to teh internal research centres was the proclamation of The Canadian Institute for Women's Culture/L'Institut Canadien pour la Culture de la Femme that the Centre for Women's Studies in Education at OISE is "a National Treasure".

Research collaboration with other universities was best exemplified during 1985/86 by a study of supervisory officials in schools carried out jointly by OISE, Queen's University and the University of Western Ontario.

Research-related activities include establishment of the Software Development Assistance Centre which is supported by the Ministry of Education and the Ministry of Colleges and Universities. This centre provides services to teachers and curriculum designers who are developing course material for the ICON or other Ontario Approved Educational Microcomputers.

Research projects are funded either from the Ministry of Education transfer grant, from the Institute's operating budget, or by one or more of a variety of external agencies. 1985/86 projects in each of these categories are listed in Appendices G, H and I. In addition to these listed projects, more than eighty "small scale" projects, intended primarily to encourage new research approaches and/or to allow an individual to capitalize on a series of small related studies were funded directly from the OISE operating budget.

Projects are funded by the Ministry of Education transfer grant only after external assessment and only if they fall into areas jointly identified by OISE and the Ministry as priorities. These priority areas are listed in Appendix F.

The R. W. B. Jackson Library

In 1985/86 staff tried to develop a closer relationship between the library and the academic departments, internal centres, internal constituencies and senior OISE administration. An attempt was made to increase awareness of library services and to solicit feedback on new services that could be established by building on existing library strengths.

An orientation survey was done in a continuing effort to promote use of library materials and services and to obtain recommendations for greater involvement of the library in strengthening research skills among students.

In terms of actual services, the highlight of the year 1985/86 is the full transfer of the Microcomputer Service to the library. The success of the service is proven by an increase in use by 9% over the number of people who used it in 1984/85.

Service to distance education students has been enhanced by the library's unique on-line participation in electronic conferencing whereby students request materials for their courses. Computer searches were also done for distance education students and materials selected from such searches were delivered to them via special courier. This enhancement was made possible by the addition of a microcomputer in the library which is used for distance education as well as for interlibrary loans.

In the Technical Services Division of the library, a feasibility study was undertaken to convert manual bibliographic records to machine-readable form. An automated data-base is essential if the library is to develop an on-line catalogue and an automated circulation system.

OISE Press

Two of the more interesting books to be published this year have been The Principal Profile by Kenneth Leithwood and Deborah Montgomery and Ontario Games by Thomas Kromer and Suzanne Regimbal. Revenues from sale of books were slightly up over last year. Ethics in Education became a formal Institute journal copy-edited and produced by the Press. In February, a presentation about the Press was made to the Board of Governors. Towards the end of the year, the operations of the Press were screened by an external reviewer.

A complete list of 1985/86 OISE Press publications appears in Appendix K.

Conferences and Special Events

As a consequence of its amalgamation with the Physical Plant Office, the Conference Office now has a greater involvement in room bookings throughout the Institute and the rental of rooms to external clients. Conference Office staff coordinated 31 events during 1985 in addition to providing consultation and support services to OISE faculty planning to launch special events.

The annual meetings of The Educational Computing Organization of Ontario and The Ontario Modern Language Teachers' Association continued to be the largest functions of this year, and this year for the first time the office coordinated two conferences simultaneously, with the OMLTA Centennial Spring Conference being held at the Toronto Hilton Harbour Castle and the Association Ontarienne des professeurs de francais at OISE.

A complete list of events sponsored by OISE and administered by the Conference Office is contained in Appendix J.

In a sense, 1985/86 was itself a special event. It was the year in which the Institute celebrated the 20th anniversary of its establishment. Some of the commemorations--the banners, the balloons, the anniversary party--were completely ephemeral; some--the special issue of Orbit, the symposium "Illuminating Education: The Uses of Science, History and Philosophy in Educational Thought", and the special issue of Interchange which it produced--are more memorable. Yet others will be lasting--the formation of The Director's Circle to recognize major contributors to the Institute's various funds, the establishment of the 20-Year Club for persons who have been on staff for a decade, and--it is to be hoped--the happy innovation of inviting outstanding school musical ensembles to perform at the Institute's social events.

On December 2, 1985, The Honourable William G. Davis (former Premier of Ontario), Elise Grossberg (charter member of the OISE Board of Governors), Christopher Hodgkinson (educational theorist), Betty Oliphant (founder and artistic director of the National Ballet School of Canada), and Shirley Stokes (retiring deputy executive director of the Federation of Women Teachers' Associations of Ontario) were named Fellows of The Ontario Institute for Studies in Education for 1985. The number of awards had been increased in recognition of the anniversary year and Mr. Davis and Mrs. Grossberg were honoured specifically for their involvement with OISE in its early years as well as their more general contributions to education in this Province.

The Sixth R. W. B. Jackson Lecture was presented by Norman M. Goble, Secretary General of the World Confederation of Organizations of the Teaching Profession on April 7, 1986.

The Institute played host to a number of visiting educators and scholars during the year. A complete list of these appears in Appendix L.

Resignation of the Director

The Board of Governors regretfully accepted the resignation of Bernard Shapiro, effective June 30, 1986. A Search Committee has been formed and it is hoped that an appointment can be made as soon as possible after July 1, 1986.

APPENDIX A

STATEMENT FOR THE SOCIAL DEVELOPMENT COMMITTEE OF THE ONTARIO LEGISLATURE

Bernard J. Shapiro, Director
January 15, 1986

The Ontario Institute for Studies in Education (OISE) was established by the Ontario Legislature in 1965 to:

> study matters and problems relating to or affecting education and to disseminate the results of and assist in the implementation of the findings of educational studies;
>
> establish and conduct courses leading to certificates of advanced standing and graduate degrees in education.

In order to respond to this province-wide legislative mandate, OISE has developed three separate but interrelated functional program areas: (1) a graduate studies program based in each of the Institute's nine academic departments and leading to the M.Ed., and M.A., the Ed.D., and the Ph.D. degrees; (2) research and development programs comprising both a wide range of studies in education and the support of five major research centres (i.e., the Modern Language Centre, the Centre for Women's Studies in Education, the Educational Evaluation Centre, the Centre for Applied Cognitive Science, and the Franco-Ontarian Centre); and (3) a field services program which centres on the services and activities of the nine OISE field centres (in Toronto, Ottawa, Thunder Bay, North Bay, Sudbury, St. Catharines, London, Kitchener, and Peterborough) but which also includes the dissemination work of the OISE Press and publication program and the field development work of all OISE departments and faculty members. Thus, OISE has been deliberately designed, in terms of both its legislative mandate and its own policy choices, to relate and respond to the world of the university on the one hand and the world of professional practice on the other. Indeed, this "Janus-faced" characteristic is the source of much of the Institute's special strength and value.

In its first decade, the Institute experienced enormous growth in its resource base, in its student population (both full-time and part-tme) and in the numbers of its faculty and staff. The period since 1975, however, has been one of consolidation and maturation. This period has seen some increase in the external funding of OISE's research and development work. More generally, however, it has been characterized by a levelling off in the numbers of students and a reduction in the numbers of faculty and staff in order to deal with the reduced constant dollar resources being made available by the government of Ontario to its university system. Nevertheless, the quality of OISE's programs have not only been maintained but, in many cases, enhanced. The real accomplishment of the Institute has been its ability, in the very short time span of a single generation, to develop not only as a resource for the practice of education in Ontario but also as a centre for the study of education that is pre-eminent in Canada and recognized throughout the world. This achievement is something in which not only we at OISE but all the citizens of Ontario can take pride.

This achievement has been made possible by the contributions of many people. First, there has been the outpouring of talent and effort by the Institute's staff and faculty. Second, there has been the past and continuing investment of time and commitment by OISE's Board of Governors. In fact, the Institute's Board of Governors, representative as it is of almost all of the educational constituencies of the Province, has been central to OISE's development. Not only has it offered appropriate guidance to the Institute as well as some assurance that the Institute's work would continue to relate to the realities of professional practice, it has also provided to OISE a vehicle of access

to province-wide policy discussions in education, an opportunity which has immeasurably enriched our work.

Third, the achievements of OISE have been made possible by the assistance of the Ontario taxpayer. One form of this assistance has been the direct grants from the Ministry of Colleges and Universities on the same basis as that on which other Ontario university-level institutions are funded. In addition, however, the Institute has been assisted by both capital funding for its facilities and a special annual "transfer" grant from the Ontario Ministry of Education, a grant which has been vital to OISE's ability both to fund applied research and to maintain the infrastructure of a sophisticated research centre. Indeed, the Ministry of Education's transfer grant to OISE is, in some ways, an actual illustration of the potentially positive value of Ontario's recent initiative in a funds for excellence program at the Province's universities. Equally important, however, as the Province's general resource provisions for the Institute, has been the Province's provision for the Institute's fiscal autonomy. This autonomy, exercised by the Institute's Board of Governors, has enabled the Institute to be the single institution in Canada where the study of education is a first priority both by choice and by definition. Moreover, it has made it possible for the Institute to engage actively and productively in a variety of activities which although by no means inconsistent with the definition of a university are, nevertheless, beyond the normal range of actual academic activity. Thus has been made possible, I believe, both the range of services provided by OISE and the richer development of our understanding of the theory-practice nexus so essential to the Institute's work.

The autonomy of the Institute is not, however, unrestricted. The OISE Act does not, rather oddly, provide the Institute with the power to grant degrees. Therefore, for the purposes of its graduate studies program, OISE has been affiliated, since its establishment, with the University of Toronto. Thus, students completing the Institute's programs have been awarded University of Toronto degrees. These affiliation arrangements do, however, dramatically circumscribe OISE's autonomy in such vital areas of concern as admission, grading, faculty, and graduation standards as well as in matters of program design. There are, of course, important advantages to these arrangements, and it is only appropriate to acknowledge the contribution of the University's School of Graduate Studies to the work of the Institute. Further, the creation by the University of Toronto and OISE of the Joint Council on Education has provided a new and increasingly effective forum for the further development not only of understanding but also of substantive new relationships between the two institutions, relationships that may well be of material advantage to both. Nevertheless, it must be said that from the perspective of OISE the affiliation relationship with the University -- whatever its advantages -- has also been the source of considerable instability given the continuing uncertainty surrounding the particular conditions under which the University would be willing to renew the agreement then in place. Despite the Institute's formal autonomy, discussions with the University cannot be imagined as a negotiation between equals and in the current context in which the government of Ontario has formally announced its intention to transfer the Institute to the University of Toronto, these discussions -- even assuming as is, I believe, the actual case the best of intentions on both sides -- are likely to be even more problematic.

What is clear, however, is that there is not substantial duplication between OISE and the University of Toronto. Of course both institutions provide administrative support services to their particular programs, but there seems no reason to imagine that substantial savings would be realized if these services were to be consolidated within a single institution. Furthermore, such savings as might result would, I believe, be more than offset by the logistical costs of any merger to the Province and the costs to the Institute of the advice and communications network of its own Board of Governors. In any case, institutional duplication can only be a public policy issue where there is inappropriate overlap in the program offerings of the two institutions. In this case, there is not. The Faculty of Education at the University of Toronto is focussed primarily on pre-service and in-service programs for teachers although it does also offer through the School of Graduate Studies, a Master of Arts in Teaching (M.A.T.) degree. The Institute, on the other hand, focusses its academic programs entirely at the graduate level and does not offer the M.A.T. degree at all.

OISE is not, of course, opposed to change in principle. We recognize that the continuing change in the context of Ontario's resources and objectives requires response and adjustment within the Province's public institutions. However, direct government intervention should not generally be seen as either the necessary or the desirable precondition to positive change. In the current affiliation agreement between OISE and the University of Toronto, substantial changes were made as compared to the provisions of the previous and initial affiliation arrangements. In the now suspended negotiations for the third affiliation agreement, it had been agreed as between the two institutions that the focus of the new discussions would be on the development of new and, hopefully, imaginative relationships between OISE and the University's Faculty of Education. This is, in fact, an area of inter-institutional change and cooperation in which the Institute retains an active interest. In my view, however, the success of such initiatives and explorations -- depending as it does on the development of motivation and commitment among the relevant faculty and staff -- will be directly commensurate with the degree to which such initiatives and explorations are mutually developed and agreed upon as between the two institutions rather than dictated by government fiat.

* * * * *

On October 24, 1985, the Ontario government announced that it intended to transfer OISE to the University of Toronto. The response of the Institute's internal constituencies was immediate and negative. The reasons were complex and multi-faceted, but the burden of the opposition expressed by these internal groups -- as well as by many of OISE's external clients -- focussed on the need for autonomy as well as (1) the possibility that the proposed transfer would result either in a curtailment of the OISE province-wide mandate in certain areas and/or a perhaps subtle but significant change in the OISE working environment so carefully developed during the past two decades; (2) the lack of prior consultation in arriving at the policy proposal; and (3) the apprehension that within the University's budget allocation process, the Institute would receive a much smaller allocation of resources than under current circumstances. This apprehension is founded, quite naturally, on the generally low priority given to

the study of education within most universities and the serious problems arising from forecasted operating deficits at the University of Toronto in particular. The response of the Institute's Board of Governors was also prompt. At a special meeting of the Board held on October 30, 1985, the Board in addition to objecting to the government's lack of prior consultation, (1) reaffirmed its determination to safeguard the identity of OISE, its unique mandate, and a degree of autonomy sufficient to respond effectively to this mandate, (2) made clear that every effort be made to retain OISE in its present structure and affiliation with the University of Toronto, but in order to remain open to any possibilities in the proposed arrangement, (3) authorized:

> . . . the Director entering into discussion with the University of Toronto and the Ministry of Colleges and Universities about the proposal of accommodating the unique institutional mandate of OISE within the University . . .

Following this meeting of the Board, discussions took place between the various parties (i.e., the government, the Institute, and the University) in order to explore these matters further. In particular, in discussions with the University, it became clear that although the University was willing to proceed on the general assumption of continuity with regard to the OISE name, the OISE building, the OISE mandate, the OISE programs, and the employment of OISE personnel, it was not willing -- beyond some very short period of transition -- to provide either for the Institute's fiscal autonomy or for some continuity of the Institute's Board of Governors. I do not believe that the University's position can be dismissed as mean-spirited and it is certainly better than a range of alternatives that might be visited upon OISE whether as part of the University under other circumstances, an independent free-standing institution, or under various imaginable affiliation arrangements. Nevertheless, the University's position was clearly not consistent with the Board of Governors' stated preference for either an affiliation arrangement or some alternative that would preserve the fiscal autonomy of OISE. Therefore, at its meeting of December 10, 1985, the Institute's Board of Governors expressed its opposition to the government's transfer proposal and on the basis of recommendations from myself and the Board's own Executive Committee resolved:

1. That the Board of Governors request the Director not to pursue any further discussions with the University of Toronto concerning the proposed transfer of OISE to the University.

2. That the Board of Governors request the Premier of Ontario to withdraw the government's policy concerning the transfer of OISE to the University of Toronto.

3. That the Board of Governors request the University of Toronto to extend the current affiliation agreement from June 30, 1986 to June 30, 1987.

4. That the Board of Governors request the University of Toronto to resume the recently suspended affiliation discussions with an aim of concluding a mutually satisfactory affiliation agreement by June 30, 1986, such discussions to include the possibility of a new and more substantial relationship between OISE and FEUT.

5. That the Board of Governors request the Director to report to it as soon as possible with regard to the previously requested exploration of a legal opinion with regard to OISE's degree-granting status.

6. That failing an acceptable response from the University of Toronto, the Board of Governors request the Director to explore the possibility of a long-term affiliation agreement with another Ontario university.

7. That the Board of Governors request the Director to present to it at its January meeting (a) a special request for any budget support required to support the Institute's interests with regard to its legal status and relationship(s) with other institutions, and (b) a report on his continuing explorations with regard to degree-granting status for OISE.

* * * * *

Responses to the Board's resolutions are now being received, but the eventual resolution of the matter of the status of OISE remains quite unclear. The position of the Institute and its Board is not, however, in doubt. Both I, my colleagues within the Institute, and the members of the Institute's Board of Governors believe that the Institute has matured to the point where it is quite capable of standing on its own. The reputation of our research and field services programs is well established, and the recent review of our graduate programs by the Ontario Council on Graduate Studies (OCGS) produced a very positive result. Therefore, I would suggest that the best resolution to the problem of our status would be an amendment to the OISE Act providing the Institute with degree-granting powers. This would appropriately recognize the achievements of the Institute and more adequately protect its autonomy -- the Board of Governors' first priority -- while in addition creating the conditions for stability that would allow more effective longer-term planning for OISE and for Ontario. This preference is not put forward so as to in any way suggest that OISE does not value the connection to the University of Toronto. This connection is, in fact, highly valued. I believe, however, that the autonomy provided by degree-granting power would, in fact, establish the basis for a more balanced and, therefore, a more productive level of inter-institutional cooperation. As others have pointed out, the highest expression of institutional autonomy is cooperation with another autonomous institution.

If the "degree-granting" resolution to the matter of OISE's status is not possible, our second preference would be affiliation with an Ontario university along the general lines of the present arrangements with the University of Toronto but (since recurrent and open-ended five-year traumas are not to be generally recommended) on a much longer-term basis. Such an affiliation agreement would provide for both continuity in the Board's present level of autonomy and a more stable environment within which OISE can pursue its objectives.

Amalgamation within another university institution -- whether within the University of Toronto or some other Ontario university -- would appear to be entirely inconsistent with the Board of Governors' views and responsibilities unless such an amalgamation takes place under a model of organization that preserves a role for OISE's Board of Governors and the fiscal autonomy of the Institute.

* * * * *

I earlier referred to the pride which I and all those connected to OISE take in its achievement and to the wonder that this level of achievement could have been realized in only two decades. This accomplishment is the result, again as I suggested earlier, of a considerable effort on the part of the members of the Institute and the people of Ontario. Success, however, like civilization itself, although dearly purchased, is a relatively fragile phenomenon. The contributions that OISE is making and hopes to continue to make to Ontario and to Canada are threatened by the prolonged ambiguity being produced by the present policy debate and the uncertainty that its outcome will provide a context in which our work can progress. The result has been not only to create a morale problem within the Institute but also to wreak havoc with the ability of our community to retain its most productive members, to recruit new talent to its ranks, and to relate effectively to our client groups. It is not without irony that this difficulty is being visited upon one of Ontario's more successful institutions. If it is to be without tragedy, some resolution of this crisis that would both safeguard the Institute's autonomy and provide at least for the possibility for increased stability is required. I would further suggest that it is needed in the very near future.

APPENDIX B

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APPENDIX C

ENROLMENT

TABLE 1
Enrolment 1980/81 to 1985/86

	1980/81	1981/82	1982/83	1983/84	1984/85	1985/86
Regular Session:*						
Full-time Students	680	660	638	614	690	646
Part-time Students	1823	1655	1564	1552	1636	1725
Summer Session**	1279	1193	1101	1015	1048	1133

*The figures show enrolments as of November 1 in accordance with current practice in Ontario universities. In all cases, students enrolled in the second term only are not included.

**There is an overlap of about 70% between registrants in the summer session and in the regular academic year.

TABLE 2
Students Classified by Program of Registration 1985/86

Degree	Full-Time		Part-Time	
Ph.D.	261	(293)*	94	(72)*
Ed.D.	128	(118)	227	(233)
M.A.	104	(107)	115	(110)
M.Ed.	149	(161)	1184	(1125)
Non-degree	2	(6)	94	(77)
Certificate	2	(5)	21	(19)
Diploma	-	-	-	-
TOTAL	646	(690)	1725	(1636)

*Figures in parentheses are for 1984/85

APPENDIX D

NUMBER OF GRADUATING STUDENTS
1981-82 to 1985-86*

	Ph.D.	Ed.D.	M.A.	M.Ed.
1981-82	62	36	27	646
1982-83	43	45	43	584
1983-84	42	36	42	469
1984-85	43	31	43	496
1985-86	51	43	30	499

*i.e. September 1985, February 1986, and June 1986

APPENDIX E

LOCATIONS OFFERING OFF-CAMPUS AND DISTANCE MODE COURSES 1985-86

Off-Campus Courses 1985-86

Location	Number of Courses	Number of Registrants
Belleville	2	24
Chapleau	1	4
Espanola	1	
Hamilton	2	36
Humber College	4	32
Kitchener	6	125
North Bay	2	11
Orillia	2	23
Peterborough	2	17
Sudbury	2	14
Wawa	2	15

Distance Education

Location	Number of Courses	Number of Registrants
Barrie	1	11
Central Bruce Grey	1	12
Elliot Lake	2	9
Kitchener	1	5
North Bay	3	34
Penetang	2	9
Sudbury	2	9
TOTAL	**38**	**397**

APPENDIX F

ONTARIO MINISTRY OF EDUCATION
TRANSFER GRANT PRIORITY AREAS
For 1985-86

Priority Area 1: Projects concerned with the Improvement of Teaching and Learning

(a) The Teaching and Learning Process (including the teaching of and learning by the exceptional pupil population)

(b) Procedures and Materials for Implementation of Programs of Improvement in School Curriculum and Instruction

Priority Area 2: Research Services, Interpretation and Dissemination of Research Findings

Priority Area 3: Development of Support and Methodological Materials for Second Language Learning -- including ESL (English as a Second Language), anglais, FSL (French as a Second Language), Heritage Languages, Native as a Second Language, and Modern Languages.

Priority Area 4: Projects Related to Student and Program Assessment

Priority Area 5: Projects to Assist Local School Boards in the Area of Special Education

Priority Area 6: Projects which Identify and Assist with Special Needs of French Language Schools and French Language Units of Instruction

Priority Area 7: Projects Related to the Nature and Needs of School Leavers and Graduates at All Levels

Priority Area 8: Projects Which Assist School Boards, Post-Secondary Institutions and Community Agencies in Meeting the Educational Needs of Adults

Priority Area 9: Projects Concerned with the Finance, Governance, and Effective Management of Schools, School Boards, Colleges and Universities

APPENDIX G

PROJECTS FUNDED BY ONTARIO MINISTRY OF EDUCATION TRANSFER GRANT
May 1, 1985 - April 30, 1986

Canadian Women's History Project

Communicative French Language Testing: Consolidating and Disseminating Results from Three Recent Evaluation Projects in the Modern Language Centre

The Effect of Textual Saliency on Learning from School Texts

Effective School Principals: What They Do and How They Think

The Effects on Young Children of Learning Turtle Geometry Programming through the Use of LOGO Microworlds

Ethnic Women in Ontario: Language and Social History Materials for Intermediate Students

Expressing Teaching Intuitions as Rules

Franco-Ontarian Centre Field Development and Dissemination Project

Further Development and Validation of Useful Graphic Methods for Analyzing Classroom Observation Data

Grade I Integrated Programming: Evaluation of Achievement of Student Learning Outcomes

Horizontal and Vertical Enrichment: A Developmental Approach to the Teaching of Central Conceptual Skills to Normal and Retarded Students

Intentional Learning

Jackson Library Assistance to Teachers

Language and Learning: Effecting Change through Collaborative Research in Multicultural Schools

Language Teaching Library and Dissemination Service (Modern Language Centre)

Learning to Understand the World of Work: Communicating with Practitioners and Academics

Literacy Materials for Occupational Health and Safety (OH&S)

MECA (Measurement, Evaluation and Computer Applications) Consulting Service

The Metalanguage and Children's Acquisition of Literacy

Multi-level Adult ESL (English as a Second Language) Materials Project

OISE Press Materials for Teachers

Perceived Problem-Solving Competence and Intrinsic Motivation

Problem-Solving Materials for Francais and Anglais Classrooms: Oral Language Enrichment Modules

Problem-Solving Strategies of School Principals

Professional Development Pool

Programmes in French-Language Elementary Schools for Students Varying Widely in French-Language Proficiency

Reading in English for Native Children

The Role of French-Language Schools in the Maintenance of French Language and Culture in Toronto

The Shape of the Central Office 1985: Administrative Staffing in Ontario School Boards

Study of Correlations of Kindergarten "Readiness" and Complex Skills Performance with Grade 1 Reading Abilities

Visual Processing and Visual Memory in Reading Disabilities and in Normal Reading Acquisition

Vocabulary Teaching in Core French: Analysis and Pedagogical Implications

Women's Educational Resource Centre (WERC)

APPENDIX H

PROJECTS FUNDED BY THE INSTITUTE
May 1, 1985 - April 30, 1986

Comparison of Direct Instruction with the Tomatis Method of Neural Training in the Treatment of Learning Disabilities: Year 2

The Documentary Management of the Job-Education Nexus: A Study in the Textually-Mediated Social Organization of Government

The In-School Team as an Assessment, Programming and Professional Development Resource: Years 2 and 3

Science Achievement in Canada: The Analysis and Presentation of Second International Science Study Data

APPENDIX I

PROJECTS FUNDED BY EXTERNAL AGENCIES
May 1, 1985 - April 30, 1986

THE BOARD OF EDUCATION FOR THE BOROUGH OF SCARBOROUGH
Second International Math Study (SIMS) Replication

THE BOARD OF EDUCATION FOR THE CITY OF LONDON
The Design of a Computerized System for Projecting School Enrollments

THE BOARD OF EDUCATION FOR THE CITY OF NORTH YORK
Second International Math Study (SIMS) Replication

THE BOARD OF EDUCATION FOR THE CITY OF TORONTO
Language and Learning: Effecting Change through Collaborative Research in Multilingual Schools

CANADA EMPLOYMENT AND IMMIGRATION COMMISSION
Development of a Testing Tool to Rate the Proficiency Level of Language Interpreters

THE CARLETON BOARD OF EDUCATION
The Design of a Computerized System for Projecting School Enrollments
Evaluation of the FL^2 Project in 1984: Phase II
Second International Math Study (SIMS) Replication

DEPARTMENT OF INDIAN & NORTHERN AFFAIRS CANADA
Reading in English for Native Children: CIRCLE Project

THE DURHAM BOARD OF EDUCATION
Second International Math Study (SIMS) Replication

EMPLOYMENT & IMMIGRATION CANADA: EMPLOYMENT DEVELOPMENT BRANCH
Employment Opportunities for Youth--Challenge '85: Summer Employment/ Experience Development

EAST PARRY SOUND BOARD OF EDUCATION
Second International Math Study (SIMS) Replication

GOVERNMENT OF THE NORTHWEST TERRITORIES
Middle Years Achievement Testing Program
Middle Years Language Testing Program: Reading and Writing Assessment. Development of English Tests for ABE (Adult Basic English) Levels A and B

LAKEHEAD BOARD OF EDUCATION
The Design of a Computerized System for Projecting School Enrollments

LEEDS AND GRENVILLE COUNTY BOARD OF EDUCATION
The Design of a Computerized System for Projecting School Enrollments

THE METROPOLITAN SEPARATE SCHOOL BOARD
Special Training Program in Individual Assessment

MON SHEONG FOUNDATION CHINESE SCHOOL
Development of Chinese Pre-School Learning Materials

ONTARIO EDUCATIONAL RESEARCH COUNCIL
Decision-Making in Curriculum Development

ONTARIO MINISTRY OF CITIZENSHIP AND CULTURE
To Develop Evaluation Guidelines for English-in-the-Workplace Programs

ONTARIO MINISTRY OF EDUCATION
Alternative Approaches to the Determination of the Distribution of School Board Trustee Representation
Decrocheurs Francophones: Une etude du depistage des decrocheurs probables
Description and Assessment of a Program for the Certification of Principals
The Development of Ontario Schools: Intermediate and Senior Division (OSIS) 1984, and the Initial Phase of Implementations
Generic Skills and Economic Development: A Pilot Project
Institutions, Organizations and the Preparation, Certification and Professionalism of Supervisory Officials
Language and Learning: Effecting Change through Collaborative Research in Multilingual Schools
The Practical Knowledge of Arts Teachers--Elementary
The Role of the Secondary School Principal in Policy Implementation and School Improvement
Selection and Promotion Procedures in Ontario School Boards
Single Learners' Acquisition of Oji-Cree as a First Language

ONTARIO MINISTRY OF EDUCATION: COMPUTERS IN EDUCATION
Design of Computer-Supported Intentional Learning Environments

ONTARIO MINISTRY OF EDUCATION: COMPUTERS IN EDUCATION CENTRE
Software Development Assistance Centre: Phase II

ONTARIO MINISTRY OF EDUCATION: CURRICULUM BRANCH
Development of a Support Document on the Teaching of Native Languages

ONTARIO MINISTRY OF EDUCATION: LEARNING MATERIALS DEVELOPMENT PLAN
ESL (English as a Second Language) Kit for Use by Native-speaking Children in the Primary Division
Reading in English for Native Children

ONTARIO MINISTRY OF EDUCATION: OFFICE OF THE DEPUTY MINISTER
Instructional Assignment Review Committee

ONTARIO MINISTRY OF EDUCATION: ONTARIO ASSESSMENT INSTRUMENT POOL
Development of Ontario Assessment Instrument Pool (OAIP) Materials -- English: Intermediate and Senior Divisions

ONTARIO MINISTRY OF EDUCATION: SCHOOL BOARD SERVICES UNIT
Development and Implementation of the Enrolment Projection System with the Educational Computing Network of Ontario (ECNO)--Phase II

ONTARIO MINISTRY OF EDUCATION AND MINISTRY OF COLLEGES & UNIVERSITIES
Ontario Approved Educational Microcomputer Software Development Assistance Centre: Year II

SECRETARY OF STATE, CANADA: HUMAN RIGHTS PROGRAMME
Human Rights Learning Resources for Adult Basic Education Students

SECRETARY OF STATE, CANADA: MULTICULTURALISM DIRECTORATE
"The Armenian Georgetown Boys" and "Listen to the Armenian Women"
Growing Up in Toronto: Parent and Community Involvement in the School
Heritage Languages: A Celebration of Canada's Linguistic Resources
National Promotion of Heritage Language Teaching among Ethnocultural Communities
National Survey: Heritage Language in Pre-Schools
The Role of French-Language Schools in the Formation of French Ethnic Identity in Toronto: Phase II
Training Workshop for Chinese Heritage Language Instructors

SECRETARY OF STATE, CANADA: NATIVE CITIZENS PROGRAMME
Clearinghouse on Language in Native Education

SOCIAL SCIENCES & HUMANITIES RESEARCH COUNCIL OF CANADA
Decision-Making in Curriculum Development
The Documentary Management of the Job-Education Nexus
Education and the Social Organization of Mother's Work
Evolution du francais parle a Welland
The History of Teaching in Quebec and Ontario, 1820-1920
Infants' Reactions to Brief Separations from Their Mothers
Literary Response as Dialectic
The Role of French-Language Schools in the Formation of French Ethnic Identity in Toronto
Socio-cultural Organization of Collaborative Writing

SOCIAL SCIENCES & HUMANITIES RESEARCH COUNCIL OF CANADA: LEARNED JOURNALS PROGRAMME
Resources for Feminist Research (RFR): Journal

THE SUDBURY BOARD OF EDUCATION
The Design of a Computerized System for Projecting School Enrollments

TORONTO BOARD OF EDUCATION: FSL (FRENCH AS A SECOND LANGUAGE)
Evaluation of the Pilot Project to Improve Core French Programming

THE WELLINGTON COUNTY BOARD OF EDUCATION
Comprehensive Study of Second Language Education in Wellington County
The Design of a Computerized System for Projecting School Enrollments

THE YORK REGION BOARD OF EDUCATION
The Design of a Computerized System for Projecting School Enrollments
Second International Math Study (SIMS) Replication

APPENDIX J

OISE CONFERENCES/WORKSHOPS
May 1, 1985 - April 30, 1986

Event	Attendance	Sponsors Internal	Sponsors External
8th Annual Moral/Values Education Conference, May 2-3, 1985	147	OISE	Ontario Moral Values Education Association
Affirmative Action Conference May 8-10, 1985	260	OISE	Employment and Immigration Canada
5th Mental Health and Deafness Conference, May 13-14, 1985	80	OISE	Ontario Ministry of Health
Philanthropy Forum - Marketing & the Media, May 28, 1985	75	OISE	The Canadian Centre for Philanthropy
It's About Time: It's About Change Conference, June 7-8, 1985	166	OISE	The American Holistic Nurses Association
Philanthropy Forum - Planned Giving June 10, 1985	67	OISE	The Canadian Centre for Philanthropy
Philanthropy Luncheon - Alternative Approaches to Creating Foundations September 26, 1985	33	OISE	The Canadian Centre for Philanthropy
Philanthropy Forum - Financial Management, October 1, 1985	29	OISE	The Canadian Centre for Philanthropy
Canadian Amateur Brewer's Association October 18-19, 1985	136	OISE	Canadian Amateur Brewer's Association
Student Conference - Alternatives to Violence, October 21, 1985	396	OISE	Toronto Board of Education
Ontario Speech and Hearing Association October 24 ^6, 1985	390		peech and Hearing Association
Controversial Issues in Moral Education Conference November 7-9, 1985	368	History & Philosophy	Association for Moral Education
6th Annual Philanthropy Conference November 11-15, 1985	443	OISE	The Canadian Centre for Philanthropy

Event	Attendance	Sponsors Internal	External
OISE Fellow's Night December 2, 1985	250	OISE	
Organization Design & Redesign Seminar, December 8-10, 1985	38	OISE	Faculty of Management Studies, University of Toronto
Philanthropy Forum - Effective Foundation Fundraising January 21, 1986	101	OISE	The Canadian Centre for Philanthropy
Disciplines: Kids Are Worth It January 25, 1986	276	OISE	Toronto Association for Children with Learning Disabilities
Sociotechnical Analysis & Design Workshop, February 2-7, 1986	39	OISE	Faculty of Management Studies, University of Toronto
Philanthropy Forum - Creating a Positive Image, February 13, 1986	80	OISE	The Canadian Centre for Philanthropy
Philanthropy Forum Luncheon - Computers & Foundations	34	OISE	The Canadian Centre for Philanthropy
Performance Appraisal for Effective Schooling, February 27-28, 1986	199	OISE/ Educational Administration	
Seminars on Audition March 14, 1986	36	OISE	
Philanthropy Forum - Endowment & Capital Gains, March 20, 1986	76	OISE	The Canadian Centre for Philanthropy
OMLTA/86 Conference April 3-5, 1986	2200	Modern Language Centre	Ontario Modern Language Teachers' Association
Association Ontarienne des professeurs de francais (AOPF) April 3-5, 1986	211	OISE	Association Ontarienne des professeurs de francais
R.W.B. Jackson Lecture April 7, 1986	300	OISE	
American Association for Italian Studies, April 11-13, 1986	181	OISE	American Association for Italian Studies

Event	Attendance	Sponsors Internal	External
9th Annual Moral/Values Education Conference, April 17-18, 1986	114	OISE History &	Ontario Moral/Values Association
Philanthropy Forum - Motivating Volunteers, April 22, 1986	72	OISE	The Canadian Centre for Philanthropy
The Active Learner April 23, 1986	225	OISE	Ministry of Education
1986 ECOO Conference April 30 - May 2, 1986	2000	OISE/ MECA	Educational Computing Organization of Ontario

APPENDIX K

OISE PRESS PUBLICATIONS
May 1, 1985 - April 30, 1986

Formal Publications

Families in Education: An Introduction (Curriculum Series #50) by Margrit Eichler and Mary Bullen

Families in Canada: Teacher's Guide (Curriculum Series #50) by Margrit Eichler and Mary Bullen

Improving Principal Effectiveness: The Principal Profile (Research in Education Series #13) by Kenneth Leithwood and Deborah Montgomery

Inquiry into the Teaching Process by John Haysom (Research in Education Series #12)

Keeping up with the Joneses (an English as Second Language Kit) by Chiquitta Phillips

Learning and Development: A Global Perspective (Symposium Series #15) edited by Alan Thomas and Edward W. Ploman

Promoting Native Writing Systems (Occasional Papers #24) edited by Barbara Burnaby

Savoir et developpement: Une perspective mondiale, Alan Thomas et Edward W. Ploman (Directeurs de Publication) (Serie des symposiums/15)

Informal Publications

Microcomputer Software for Language Arts (Informal Series #63) by Michael Canale et al.

Science Education in Canada (Informal Series #60) by Michael Connelly, Robert Crocker, and Heidi Kass

Journals

Interchange 16/2, 16/3, 16/4, 17/1

Orbit 75, 76, 77, 78

Periodicals

Publications '86 (the Catalogue)

The Fall Supplement '85

Fun With Mathematics 8 issues

Ethics in Education 5 issues

News and Notes 4 issues

Special Brochures

What is OISE?

OISE in the Schools

APPENDIX L

VISITING PROFESSORS, SCHOLARS, EDUCATORS, 1985/86

Unit	Name	Designation	Home Institution
Adult Education	Dr. George L. Cook	Visiting Scholar	Bermuda College
Curriculum	Dr. Miriam Ben-Peretz	Visiting Scholar	University of Haifa, Israel
Curriculum	Dr. J. Menis (50%)	Visiting Scholar	Bar-Ilan University, Israel
Curriculum	Professor Glen Estabrook	Visiting Professor	Queen's University
Educational Administration	Mr. Walter Coulthard	Visiting Educator	Board of Education for the City of East York, Ontario
Educational Administration	Professor Vern Gilbert	Visiting Professor	Faculty of Education of the University of Toronto
Educational Administration	Professor R. Ouelett	Visiting Professor	Laval University
History & Philosophy	Dr. M.T. Ramji	Visting Scholar	Somali National University
History & Philosophy	Dr. Young Hong Chung	Visiting Scholar	Pusan University, Korea
Measurement, Evaluation and Computer Applications	Dr. J. Menis (50%)	Visiting Scholar	Bar-Ilan University, Israel
Measurement, Evaluation and Computer Applications	Dr. . Seguin	Visiting Professor	Laurentian University
Measurement, Evaluation and Computer Applications	Professor Leo Ferrari	Visiting Professor	St. Thomas University, New Brunswick
Sociology	Dr. Penny Gross	Visiting Scholar	Department of Sociology, University of Toronto
Sociology	Professor A. McLaren	Visiting Professor	Simon Fraser University, British Columbia
Sociology	Professor D. Harrison	Visiting Professor	Brock University
Sociology	Professor G. Wekerle	Visiting Scholar	York University
Sociology	Professor G. Hunnius	Visiting Scholar	York University
Special Education	Professor Uri Shafrir	Visiting Professor	York University

VISITING PROFESSORS, SCHOLARS, EDUCATORS, 1985/86

Unit	Name	Designation	Home Institution
Centre for Applied Cognitive Science	Dr. J. Kirby	Visiting Scholar	University of Newcastle, New South Wales, Australia
Centre for Applied Cognitive Science	Mr. Flemming Kress	Visiting Scholar	Victoria Park Secondary School, Toronto
Centre for Applied Cognitive Science	Dr. R. Narasimhan	Visiting Scholar	National Centre for Software Development, Bombay, India
Centre for Women's Studies in Education	Dr. J. Stoppard	Visiting Scholar	University of New Brunswick
Centre for Women's Studies in Education	Ms. Joan Baril	Visiting Scholar	Confederation College, Ontario
Centre for Women's Studies in Education	Dr. Carolyn Strange	Visiting Scholar	University of Ottawa

APPENDIX M

FINANCIAL STATEMENTS
May 1, 1985 - April 30, 1986

ALLEN, MILES, FOX & JOHNSTON
CHARTERED ACCOUNTANTS

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AUDITORS' REPORT

To the Board of Governors of
The Ontario Institute for Studies in Education

We have examined the balance sheet of The Ontario Institute for Studies in Education as at April 30, 1986 and the statements of operations, unappropriated surplus, reserve for future pension liabilities, reserve for revenue stabilization, reserve for equipment replacement, investment in fixed assets and changes in restricted funds for the year then ended. Our examination was made in accordance with generally accepted auditing standards and accordingly included such tests and other procedures as we considered necessary in the circumstances.

In our opinion these financial statements present fairly the financial position of the Institute as at April 30, 1986 and the results of its operations for the year then ended in accordance with the basis of accounting described in Note 1 to the financial statements applied, except for the change in accounting policy as described in Note 2 to the financial statements, on a basis consistent with that of the preceding year.

Toronto, Canada
June 6, 1986

Allen Miles Fox & Johnston
Chartered Accountants

THE ONTARIO INSTITUTE FOR STUDIES IN EDUCATION
Established by an Act of the Legislative Assembly of the Province of Ontario

BALANCE SHEET AS AT APRIL 30, 1986

	1986 ($000)	1985 ($000)
ASSETS		
Operating		
Short-term investments	$ 5,637	$ 6,030
Accounts receivable	940	772
Publications inventory	241	295
Prepaid expenses	94	82
	6,912	7,179
Plant		
Land and building (note 1)	19,214	19,214
Furniture and equipment	7,123	6,645
Library books	3,335	3,077
	29,672	28,936
	$ 36,584	$ 36,115
LIABILITIES		
Operating		
Current		
Bank indebtedness	$ 207	$ 112
Accounts payable and accrued liabilities	1,471	1,691
Deferred revenue	1,034	1,073
	2,712	2,876
Surplus		
Unappropriated surplus	1,474	1,306
Reserve for future pension liabilities	-	535
Reserve for revenue stabilization	2,053	1,865
Reserve for equipment replacement	409	372
	3,936	4,078
Restricted		
Fund balances (note 1)	264	225
	6,912	7,179
Plant		
Capital portion of future building payments (note 1)	7,904	8,451
Investment in fixed assets	21,768	20,485
	29,672	28,936
	$ 36,584	$ 36,115

THE ONTARIO INSTITUTE FOR STUDIES IN EDUCATION

STATEMENT OF OPERATIONS
FOR THE YEAR ENDED APRIL 30, 1986

	1986 ($000)	1985 ($000)
Revenue		
Province of Ontario Grants:		
Ministry of Colleges and Universities	$ 16,598	$ 16,256
Ministry of Education	2,150	2,066
Building occupancy	3,570	3,559
Sponsored research	3,029	2,393
Tuition fees	1,676	1,641
Rentals	652	564
Workshops and conferences	113	109
Other	2,122	2,114
	29,910	28,702
Expenditure		
Graduate instruction	10,718	10,281
Research and field development	5,658	5,781
Sponsored research	3,008	2,392
Physical plant	4,789	4,834
Library	1,597	1,561
Computing	529	914
Media services	274	143
Publications	968	962
Workshops and conferences	109	108
Administration and general	1,673	1,664
	29,323	28,640
Excess of revenue over expenditure	$ 587	$ 62

THE ONTARIO INSTITUTE FOR STUDIES IN EDUCATION

STATEMENT OF UNAPPROPRIATED SURPLUS
FOR THE YEAR ENDED APRIL 30, 1986

	1986 ($000)	1985 ($000)
Balance, beginning of year	$ 1,306	$ 1,883
Excess of revenue over expenditure	587	62
	1,893	1,945
Transfer to following:		
Reserve for future pension liabilities	194	220
Reserve for revenue stabilization	188	194
Reserve for equipment replacement	37	225
	419	639
Balance, end of year	$ 1,474	$ 1,306

STATEMENT OF RESERVE FOR FUTURE PENSION LIABILITIES
FOR THE YEAR ENDED APRIL 30, 1986

	1986 ($000)	1985 ($000)
Balance, beginning of year	$ 535	$ 315
Transfer from unappropriated surplus	194	220
Payment to pension plan	(729)	-
Balance, end of year	$ -	$ 535

STATEMENT OF RESERVE FOR REVENUE STABILIZATION
FOR THE YEAR ENDED APRIL 30, 1986

	1986 ($000)	1985 ($000)
Balance, beginning of year	$ 1,865	$ 1,671
Transfer from unappropriated surplus	188	194
Balance, end of year	$ 2,053	$ 1,865

THE ONTARIO INSTITUTE FOR STUDIES IN EDUCATION

STATEMENT OF RESERVE FOR EQUIPMENT REPLACEMENT
FOR THE YEAR ENDED APRIL 30, 1986

	1986 ($000)	1985 ($000)
Balance, beginning of year	$ 372	$ 147
Transfer from unappropriated surplus	37	225
Balance, end of year	$ 409	$ 372

STATEMENT OF INVESTMENT IN FIXED ASSETS
FOR THE YEAR ENDED APRIL 30, 1986

	1986 ($000)	1985 ($000)
Balance, beginning of year	$ 20,485	$ 18,487
Additions:		
Plant expenditures - net	1,283	1,998
Balance, end of year	$ 21,768	$ 20,485

THE ONTARIO INSTITUTE FOR STUDIES IN EDUCATION

STATEMENT OF CHANGES IN RESTRICTED FUNDS
FOR THE YEAR ENDED APRIL 30, 1986

	1986 ($000)	1985 ($000)
Revenue		
Gifts	$ 40	$ 66
Investment income	25	19
	65	85
Expenditures	26	14
	39	71
Balance, beginning of year	225	154
Balance, end of year	$ 264	$ 225

THE ONTARIO INSTITUTE FOR STUDIES IN EDUCATION

NOTES TO FINANCIAL STATEMENTS
APRIL 30, 1986

1. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

A. Accrual Basis

In accordance with generally accepted accounting principles for educational institutions, the Institute follows the accrual basis of accounting.

B. Fixed Assets

Fixed assets are stated at cost. It is the policy of the Institute to recognize fixed asset additions as both expenditures of the current period and as a capital investment in fixed assets. Similarly, fixed asset dispositions represent revenue of the current period to the extent of the sale proceeds and also a reduction in the capital investment in fixed assets to the extent of the cost of the asset.

The Institute's building at 252 Bloor Street West, Toronto, is held under a lease/purchase agreement requiring annual payments of approximately $2,200,000 over a 30-year term expiring October, 2000. In accordance with generally accepted accounting principles, the building and related obligations have been included in the balance sheet at the discounted value of future lease payments exclusive of the portion attributable to interest and maintenance costs.

The annual lease payments are being made by the Ministry of Government Services on behalf of the Institute. The outstanding principal portion of the lease obligation is reflected as capital portion of future building payments.

The Province of Ontario has agreed to transfer the land on which the building is situated to the Institute upon the satisfaction of certain conditions. The land presently reflected in the balance sheet is additional property adjacent to the building site.

C. Inventories

Inventories are valued at cost which is determined by the first-in, first-out method, less a provision for slow-moving items.

D. Investments

Investments are stated at cost.

E. Deferred Revenue

It is the Institute's policy to defer the unexpended portion of sponsored research grants or contracts which have not been completed at the end of the fiscal year or which apply to the subsequent year.

THE ONTARIO INSTITUTE FOR STUDIES IN EDUCATION

NOTES TO FINANCIAL STATEMENTS
APRIL 30, 1986

1. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (continued)

F. Pension Plan

The Institute has a pension plan covering substantially all of its staff. The Institute's current policy is to fund and expense current pension costs at a level equal to 125% of the employee contributions. Between January 1, 1984 and January 31, 1986, an amount equal to 25% of the employee contributions plus an internal interest allocation, based on current rates, had been transferred to the reserve for future pension liabilities. The balance in the reserve was remitted to the pension plan prior to the fiscal year end.

G. Restricted Funds

The restricted funds have been established to account for assets available to meet expenses as specified by their contributors or, in the case of internal transfers of funds, as specified by the Institute.

2. CHANGE IN ACCOUNTING POLICY

The Institute has changed its policy regarding certain transfers to the reserve for equipment replacement, and the reserve for future pension liabilities. Previously, these particular transfers were made from the excess of revenue over expenditure in the year. These transfers are now being made from unappropriated surplus. This change has been applied retroactively, and the comparative figures have been restated accordingly. As a result, the 1985 excess of revenue over expenditure is $239,000 greater than previously reported and the balances for unappropriated surplus, reserve for future pension liabilities and reserve for equipment replacement as at April 30, 1985 remain unchanged.

3. PENSION PLAN

The triennial actuarial review in the 1983/84 fiscal year disclosed that there was no unfunded liability.

4. CONTINGENT LIABILITIES

The Institute guarantees bank loans to staff members for housing. At April 30, 1986, the amount of the loans guaranteed was $15,318 against which the Institute holds mortgages as collateral security.

THE ONTARIO INSTITUTE FOR STUDIES IN EDUCATION

SCHEDULE OF EXPENDITURE INCLUDED IN THE STATEMENT OF OPERATIONS
FOR THE YEAR ENDED APRIL 30, 1986
($000)

	Remuneration	Occupancy	Supplies, printing, postage	Communications	Data services	Equipment rental & maintenance	Travel	Plant	Other	Total 1986	Total 1985
Graduate instruction	$ 9,229	$ -	$ 249	$ 39	$153	$ 24	$103	$113	$ 808	$10,718	$10,281
Research & field development	5,138	-	195	37	42	8	128	108	2	5,658	5,781
Sponsored research	1,863	-	198	23	139	21	249	58	457	3,008	2,392
Physical plant	433	3,946	30	79	-	35	-	262	4	4,789	4,834
Library	1,204	-	66	1	52	2	-	271	1	1,597	1,561
Computing	199	-	66	10	-	73	1	60	120	529	914
Media services	207	-	31	1	-	4	1	27	3	274	143
Publications	530	-	394	2	3	6	3	7	23	968	962
Workshops & conferences	106	-	-	-	-	-	1	1	1	109	108
Administration & general	1,138	-	215	2	2	73	56	86	101	1,673	1,664
	$20,047	$3,946	$1,444	$194	$391	$246	$542	$993	$1,520	$29,323	$28,640